

TOWIBA SOFTWARE TECHNOLOGIES

User's Guide

—PURCHASE ORDER— **No. 1**

Towiba Software Technologies
1 Industrial Drive
Fenton, Missouri 63163
Phone: Fax:

05/07/04
Page 1 of 1

Vendor:
McMaster-Carr
1 Industrial Way
Fenton, Missouri 63121
Attn: Jack Nimble
Phone: 314-839-9877

Ship To:
Towiba Software Technologies
1 Industrial Drive
Fenton, Missouri 63163

Date Req.: **Terms:**
Net 60

	Qty	Part #
1	3	22312-MB
2	4	33334-SB
3	1	22212-MB

REQUEST FOR QUOTATION **No. 1**
05/07/04
Page 1 of 1

Towiba Software Technologies
1 Industrial Drive
Fenton, Missouri 63163
Phone: Fax:

Payment Terms: **Freight:**

Qty/Unit	Unit Price	Qty	Disc

Purchase Order Report
05/07/04

Date	P.O. #	Part Number	Part Description	Vendor	Qty	Total
15/07/04	12	33334-SB	1x3 Shoulder Bolt	McMaster-Carr	2	\$21.95
15/07/04	12	22312-MB	1/4x2 Machine	McMaster-Carr	2	\$21.95
15/07/04	12	45212-222	Sledge Hammer	Hama Depot	1	\$12.95
15/07/04	12	5555555	T-47	Beking	1	\$100,000,000.02
15/07/04	12	1111111	7x7 Strutsiner	Beking	1	\$100,000,000.10
15/07/04	12	22212-MB	1/4x2 Machine	McMaster-Carr	1	\$5.00
15/07/04	11	22312-MB	1/4x2 Machine	McMaster-Carr	1	\$5.00
15/07/04	11	33334-SB	1x3 Shoulder Bolt	McMaster-Carr	2	\$21.95
15/07/04	11	22212-MB	1/4x2 Machine	McMaster-Carr	1	\$5.00

Purchase Agent Lite™ (PAL)

TOWIBA SOFTWARE TECHNOLOGIES INC.

Purchase Agent Lite User's Guide

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Fenton, Missouri 63026
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Introduction

Purchase Agent Lite makes purchasing and getting quotations a breeze.

If quick and easy are the two words that best describe how you desire to make repeat purchases, then you have acquired the right software. Gone are the days when you carried a hand written purchase order or request for quotation to the office fax machine where you fed it your pages and hoped for the best. Within minutes of installing Purchase Agent Lite, you could be faxing a purchase order or a request for quotation right from your desk via your computer's fax modem. To get started all you have to do is supply some information about your company, yourself, the vendor you are buying from and the products you wish to buy. Then with just a few more clicks of your mouse you will be faxing your vendor a clear, professional looking purchase order (PO) or request for quotation (RFQ). All the information you enter is stored in a database so that you can create a new PO or RFQ and fax it in less time than it would take to get a cup of coffee, even if the pot is on your desk. If more than one person is responsible for purchasing in your company, Purchase Agent Lite can be configured so that they all share the same database. All other registered users can share vendor and product information entered by one user. Purchase Agent Lite also maintains a record of all PO's or RFQ's you have created and it allows you to easily create reports of your purchasing activity. We have strived to make Purchase Agent Lite easy to use yet flexible enough to handle the way you want to do your purchasing. Thank you for buying our program. We hope you enjoy using it..

System Requirements

- Microsoft Windows 95, 98, ME, NT, 2000, XP

- Fax Modem

- Minimum 10 Megabytes of free hard drive space, more recommended for backups and database growth

- A network drive accessible to all licensed users of PAL if they will be sharing a common database.

Contract Law

Contract law governs purchasing.

One aspect of “Purchasing” that should always be considered relates to the law. When you send a purchase order to a vendor you are making the offer of a contract. When your vendor actually accepts your purchase order, then the purchase order becomes a contract. For a contract to be legally binding it must meet several key criteria. First, the parties entering into the contract must be competent. Most people and companies have sufficient legal competency. Second, if the vendor has accepted your offer and is willing to supply your request, there has to be a mutually understood promise that you, the buyer, will pay for these goods. This is referred to as “Consideration”. Third, there has to be “Mutual Assent” or “Meeting of the Minds” which simply means that each side must be clear as to the essential details, rights, and obligations of the contract. Fourth, if other laws govern the goods and services you intend to buy, all such laws must be followed. After a purchase order has been offered and accepted and it meets the criteria of a legally binding contract, the next phase is contract performance. Performance is the act of actually completing the deal according to the terms given in the contract. Both parties must live up to their end of the bargain if the contract is to have closure. In other words, until both parties have properly performed under the contract, the contract remains open. Though purchase orders created by Purchase Agent Lite generally satisfy the “Mutual Assent” criteria of a binding contract, it might be wise to establish a “Mutual Agreement”, or a “Buyer/Supplier” contract with your vendors before initiating purchases. You may want to state in your agreement by what financial means payments are to be made, when they are to be made and how issues of returns, partial orders and defects are to be dealt with. Additionally, you may want to state how price increases not established or known beforehand should be handled. By having such an agreement or contract you may avoid misunderstandings that can cost you time, money and possible litigation. This section on contract law was included as a courtesy and as a reminder, that purchasing goods and services has legal implications. It was not written by lawyers and should not be your sole source of information regarding contract law. Rights as a buyer or purchasing agent will most likely vary from state to state. We advise you to seek qualified legal counsel for matters germane to your unique situation.

Installation and Setup

Purchase Agent Lite is easy to install.

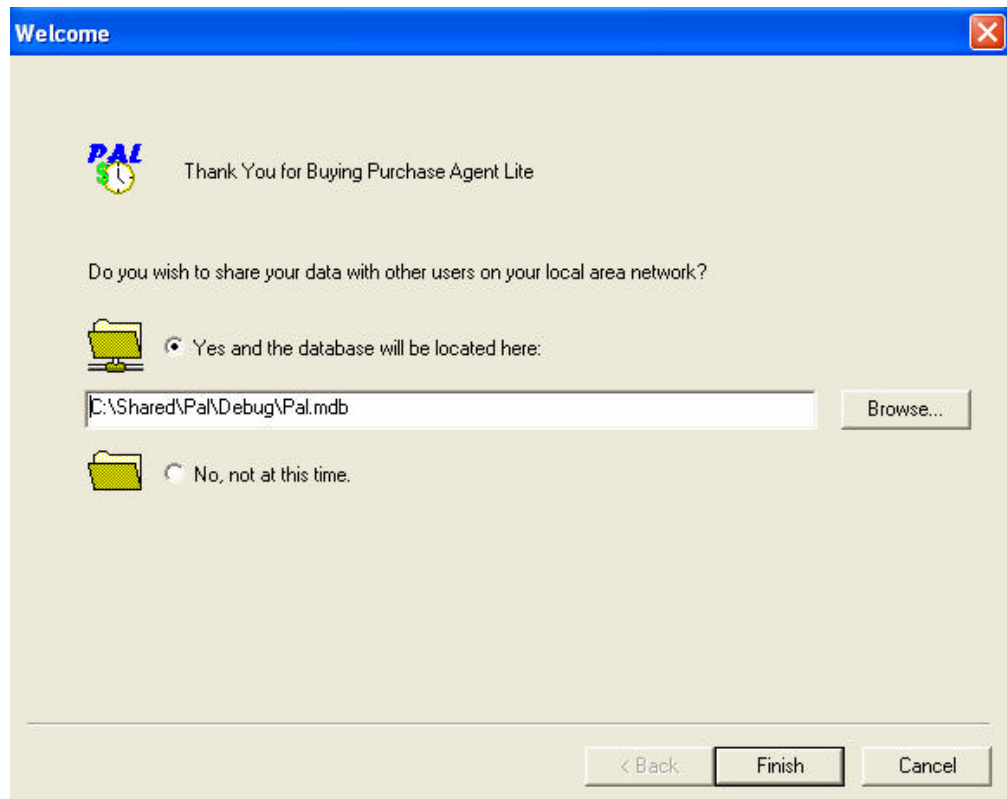
Installation

To begin installing **Purchase Agent Lite**, simply place the install CD in your CD drive. The installation program should start automatically. If it does not, then click on the Start button, select Run... then type D:setup<enter> (assuming your CD drive is the D: drive, use the correct letter if it isn't).

Setup

The first time you start **Purchase Agent Lite (PAL)** after installation, you will be presented with a wizard that guides you through the first steps of configuring the software. After you have supplied all the information required on each wizard page, press the **Next** button to proceed to the next page. If you make a mistake and need to go back, just press the **Back** button.

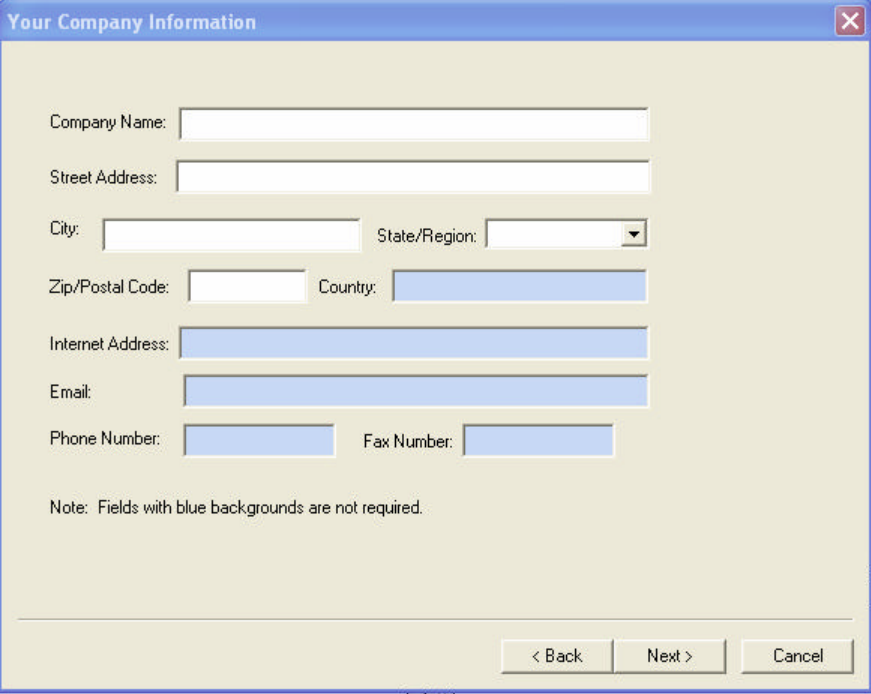
The first page, "Welcome", allows you to specify where the database file used by **PAL** will be kept.



If you intend to share your data with other licensed users of **PAL**, select the **Yes and the database will be located here** radio button, then supply a network path in the edit box to the left of the **Browse** button. You can use either a drive mapping or you can specify the network path using a UNC address as in `\\Daisy\Shared\Pal.mdb`. You can also use the **Browse** button to select a folder. You do not need to supply a file name because `Pal.mdb` will be used.

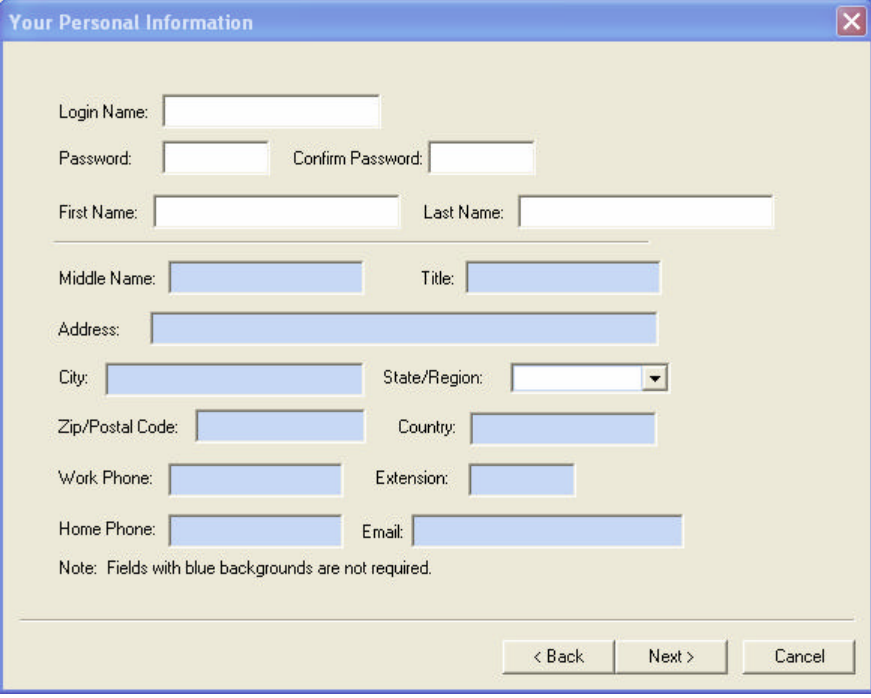
If you will be the only person using **PAL**, simply select the **No, not at this time** radio button.

The next wizard page, "Your Company Information", asks you for some information about your company. Some of the information you supply will appear on the purchase orders and quotes that you create. Other fields are just for reference. Company Name, Street Address, City, State/Region, Zip/Postal Code, Phone Number and Fax Number are important fields that must be supplied.



The screenshot shows a Windows-style dialog box titled "Your Company Information" with a close button (X) in the top right corner. The dialog contains several input fields for company details. The fields are arranged vertically: "Company Name:" followed by a text box; "Street Address:" followed by a text box; "City:" followed by a text box and "State/Region:" followed by a dropdown menu; "Zip/Postal Code:" followed by a text box and "Country:" followed by a text box with a blue background; "Internet Address:" followed by a text box with a blue background; "Email:" followed by a text box with a blue background; "Phone Number:" followed by a text box with a blue background and "Fax Number:" followed by a text box with a blue background. At the bottom left, there is a note: "Note: Fields with blue backgrounds are not required." At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

The third wizard page, "Your Personal Information", collects some basic information about you. Most of the information is for reference, with only your first name, middle initial, and last name appearing on forms generated by the program. You must supply a login name but a password is not required. If there will be other users sharing the database or you wish to limit access to PAL, you should consider using a password.



Your Personal Information

Login Name:

Password: Confirm Password:

First Name: Last Name:

Middle Name: Title:

Address:

City: State/Region:

Zip/Postal Code: Country:

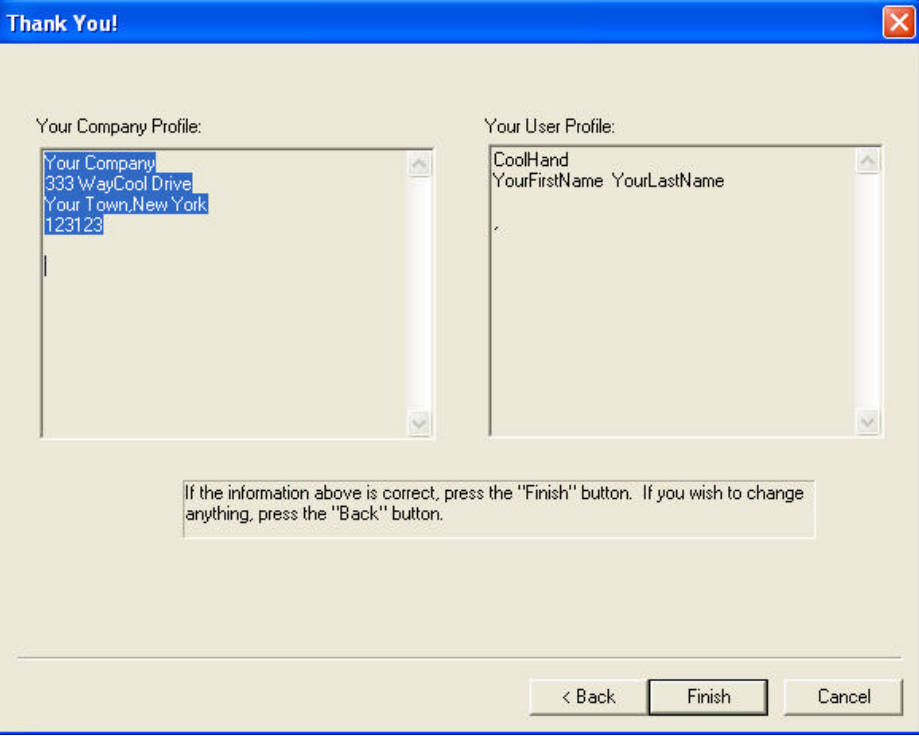
Work Phone: Extension:

Home Phone: Email:

Note: Fields with blue backgrounds are not required.

< Back Next > Cancel

The final wizard page, "Thank You!", is a confirmation page. It allows you to examine the information you supplied for correctness.



Thank You!

Your Company Profile:

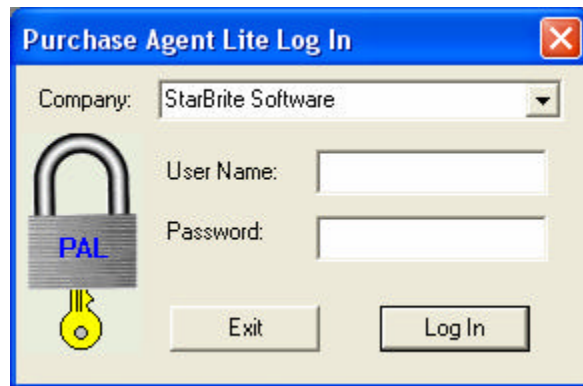
Your User Profile:

CoolHand
YourFirstName YourLastName

If the information above is correct, press the "Finish" button. If you wish to change anything, press the "Back" button.

< Back Finish Cancel

Once you have completed the setup wizard, PAL will display a login dialog. This same dialog will appear each time you start PAL.



Type in your login name and if you are using passwords, your password. If the login name and password are correct, you will be allowed to begin using PAL to manage your forms (Purchase Orders, Requests for Quotation, etc.).

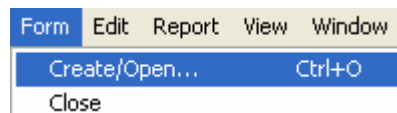
Note: If the software was properly configured, the wizard will not appear the next time you start PAL.

Purchase Orders

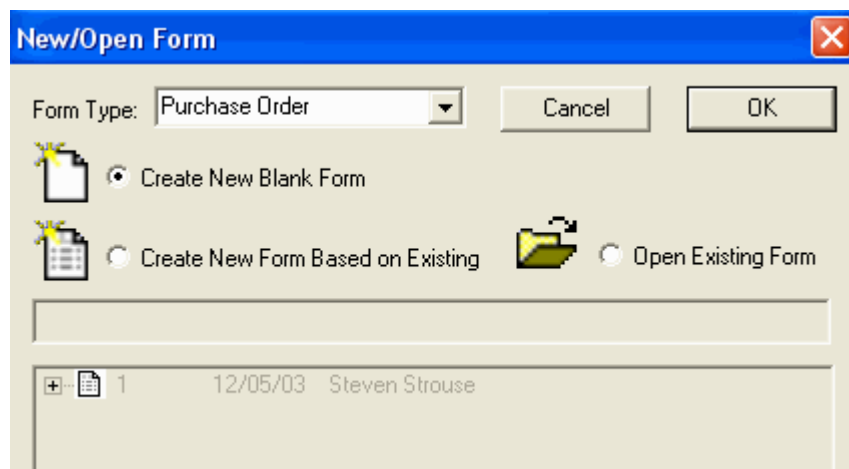
Purchase Orders are easy to create, print and fax with Purchase Agent Lite.

Create/Open a Purchase Order

Every time you log into **PAL**, the **New/Open Form** dialog will automatically appear. If you have already logged in, you can create/open a purchase order by selecting **Form | Create/Open** from the menu.



To create or open a purchase order, first select "Purchase Order" in the **Form Type** box.



Then select one of the following:

Create New Blank Form - If you wish to create a new, empty purchase order.

Create New Form Based on Existing - If you wish to create a purchase order that contains the same items as an existing purchase order. After selecting this option, you must then select the existing purchase order from the **Existing Forms** list below the radio buttons.

Open Existing Form - If you wish to open an existing purchase order. After selecting this option, you must then select the existing purchase order from the **Existing Forms** list below the radio buttons.

To help you decide which purchase order to open or use for the basis of a new one, you can view the items on a purchase order by clicking the "+" next to the order number. The **Existing Forms** list will be disabled if the **Create New Blank Form** is selected.

Finally, click on the **OK** button to open the new or existing purchase order.

Note: A purchase order can only be modified by the user that created it provided that it hasn't already been sent to a vendor.

[illegible]

Filling Out a Purchase Order

Here are the steps to filling out a purchase order:

- 1) **Select a vendor** - A newly created purchase order will have a tab at the top labeled, "**New**". This "New" tab indicates that no vendor has yet been selected for this purchase order. If this is the first purchase order that you have ever created, you probably have yet to enter any vendors or vendor information. Don't worry. Simply click in the box labeled, **Vendor**, and begin typing. If a vendor does not exist in the database whose name begins with the letters you typed, the **Add a New Vendor** dialog will be displayed allowing you to enter the vendor information. When you click **OK** in the vendor dialog, information about the vendor will be added to the database for use in future purchase orders. If you have previously entered vendors into the database, just select one from the **Vendor** combo box. Once you have selected a vendor, the "New" tab label will be changed to the name of the selected vendor.
- 2) **Select a ship to address** - Specify the address to which the items will be shipped by selecting the address label in the **Ship To** box. The box directly beneath the address label will be filled in with the complete address. If you wish to add an address, simply begin typing a label for it in the **Ship To** box. If an address does not exist in the database whose label begins with the letters you typed, the **Add a New Address** dialog will be displayed, allowing you to enter the address information.
- 3) **Enter order number** - If you wish to specify an **Order #** other than the one supplied, simply click in the box and type it in.
- 4) **Select payment** - Specify the means by which the vendor will be paid by selecting a payment method from the **Payment** box. The **Payment** box contains "C.O.D", "Vendor Account", user-defined credit cards and/or user-defined projects. Once you've selected a payment method, additional information will be displayed in the box below the **Payment** selection box. If you wish to pay by credit card or project and its name doesn't appear in the **Payment** box selections, you must **Edit the Database**, choose the "Credit Card" or "Project" tab, and add it.
- 5) **Specify date required** - If the date by which you require the shipment is not displayed in the **Date Required** box, click on the down arrow on the right side of the box. A pop-up calendar will be displayed from which you can select the appropriate date.
- 6) **Supply additional information** - To supply additional information such as Department, FOB, Ship Via, Terms, Special Instructions, etc. click on the **More Information...** button. The More Information dialog will appear.

More Information for Purchase Orders

Department: F.O.B.

Ship Via: Terms:

Project:

On Printed Purchase Order

☐ Show Cost

☐ Show Date Required

On Sent Purchase Order

☐ Show Cost

☐ Show Date Required

Special Instructions

☒ P.O. Number must appear on all invoices, packaging, shipping, etc.

☒ Please notify us promptly if you are unable to complete the order by the date required.

☐ Please send copies of your invoice with the original Bill of Lading.

☐ Please call ahead to arrange delivery time.

☐ User Defined:

Please notify us promptly if you are unable to complete the order by the date required.
P.O. Number must appear on all invoices, packaging, shipping, etc.

The information you supply in this dialog will be associated with the selected vendor and can be different for each vendor. Below is a description of each field:

Department - Your receiving department can use information supplied in this field to determine the final destination of your products. Your accounting department may also use this field. If the desired department is not in the list when you click the combo box down arrow, simply type it in the box. Any department information that you type in the box will automatically be added to the database. You may also leave this field blank.

FOB - This term is an acronym for “Free On Board”. It relates to where a vendor’s responsibility ends when shipping your products. If “Origin” is used, then the vendor’s responsibility ends when the product is placed safely on a ship, truck or other means of shipment. If “Destination is used, then the vendor is responsible for the product until it arrives at your business.

Ship Via - By specifying this field you are directing your vendor to ship your product a certain way. Some examples might be “FedEx”, “UPS Red”, “UPS Ground”, “USPS Priority”, etc. Leaving this field blank or choosing “Best

Way” will give your vendor the flexibility to choose the most effective shipping method. If the shipping method you prefer is not in the list when you click the combo box down arrow, simply type it in the box. Any information typed in the box will be added to the database as a Ship Via method.

Terms - By specifying “Terms” you are letting the vendor know how you expect to pay for the goods or services. For example, by specifying “Net 30” in this field, you are telling the vendor to expect payment within 30 days of receipt of the products. Contact your vendor to negotiate terms if you are uncertain about what to put in this field.

Project - If you wish to associate your purchase order with a particular project, select it from this combo box. Projects can be added, changed or deleted by selecting **Edit | Database** from the menu and selecting the **Project** tab.

Show Cost On Printed Purchase Order – If you check this box then **PAL** will show the cost of each product or service on the printed purchase order. Doing this may serve as a reminder to the vendor that you had agreed upon a cost for each product perhaps via a request for quotation. If you don’t include cost on your purchase order then the vendor will probably use the latest pricing.

Show Cost On Sent Purchase Order – If you check this box then **PAL** will show the cost of each product or service on the purchase order that is sent to the vendor. Doing this may serve as a reminder to the vendor that you had agreed upon a cost for each product perhaps via a request for quotation. If you don’t include cost on your purchase order then the vendor will probably use the latest pricing.

Show Date Required On Printed Purchase Order – If you check this box then **PAL** will show the date you require your products or services on the printed purchase order. If you don’t include the date required on your purchase order then you leave it up to the vendor’s discretion to decide when your order will be filled and shipped.

Show Date Required On Sent Purchase Order – If you check this box then **PAL** will show the date you require your products or services on the order that is sent to the vendor. If you don’t include the date required on your purchase order then you leave it up to the vendor’s discretion to decide when your order will be filled and shipped.

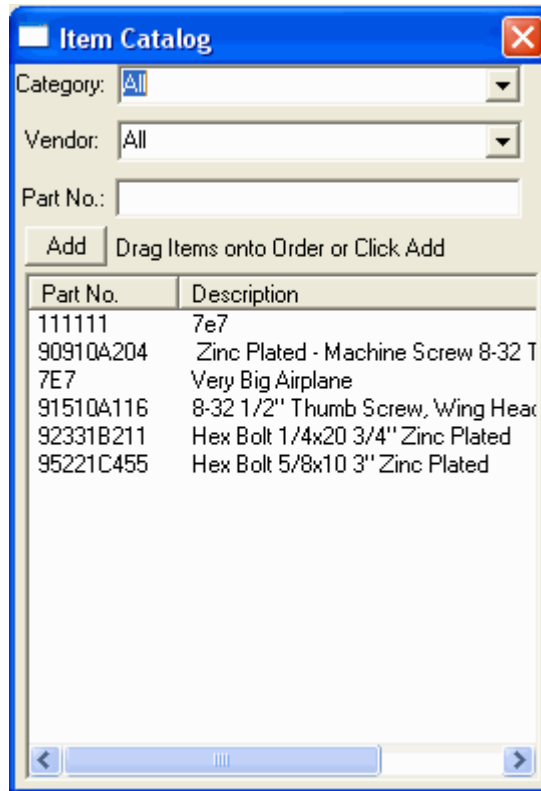
Special Instructions - At the bottom of the **More Information for Purchase Orders** form is a large edit box. The information supplied in this edit box will appear on the printed or sent purchase orders. There are several ways to get information into this edit box. The most direct way is to simply click with your left mouse button in the edit box or tab to it then begin typing.

Another way to get information into the edit box is by clicking on the checkboxes next to the pre-defined messages under the **Special Instructions** heading. If you wish to use the "Please send _____ copies of your invoice with the original Bill of Lading." message, type a number in the edit box before the word "copies" prior to clicking the checkbox in front of the message. Un-checking any of the checkboxes in front of a pre-defined message should remove it from the large edit box. Once you have everything in the large edit box defined as you wish to have it appear in the Special Instructions field of the printed or sent purchase order, you can save it as a user defined message to save time and typing in the future. You do this by typing a label string in the **User Defined** combo box just above the large edit box containing your message and then pressing the **Save** button next to the combo box. Your message will be stored in the database along with the label string you gave it. The next time you wish to use your special message, select its label string from the **User Defined** combo box, and then click the checkbox next to the words "User Defined". User defined special instruction strings are managed using the **Other** tab in **Edit Database**.

- 7) **Add items to the purchase order** - Below the various boxes at the top of the purchase order form is a list for entering the items you wish to purchase. Since you have already selected a vendor, only items supplied by that vendor can be added to the list. To add an item, click anywhere on the first empty line in the list. If you click in the "Qty" field, type in the quantity of a particular item that you wish to buy then press **Enter** or **Tab**. If you click in the "Part Number" or "Description" fields, the part numbers or descriptions of all parts supplied by the vendor that haven't already been added to the purchase order will be displayed. When you select from either of these two lists, the other field and the "Qty/Unit", "Cost" and "Total" fields will automatically be filled in. If no part numbers or descriptions are displayed, then either you've already added all existing products to your purchase order and/or a new product needs to be added to the database. To add a new product for the selected vendor, click in the "Part Number" or "Description" field, type in the information, then press **Enter**. The **Add a New Product** dialog will appear. Type the information for the product, then click **OK**. The product information will be added to the database and associated with the selected vendor. A quick and easy way to add items to your purchase order without selecting items from the combo boxes in the item list is to use the **Item Catalog**. The **Item Catalog** allows you to sort products by vendor or category and then drag and drop them onto your purchase order.

Using the Item Catalog

The Item Catalog provides a convenient way for you to add items to a purchase order. To use it, select **Tools | Item Catalog...** from the menu or click the Item Catalog toolbar button.



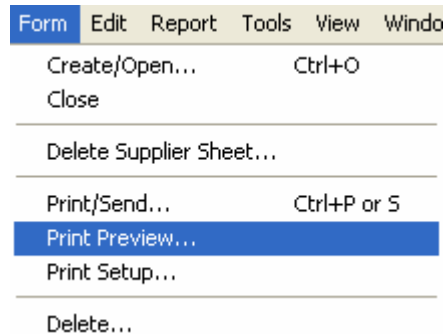
The Item Catalog displays a list of parts that meet the criteria specified by the four controls at the top of the dialog. If you wish to select parts that only belong to a certain category, choose the category from the **Category** combo box. If you wish to select parts that only belong to a certain vendor, choose the vendor from the **Vendor** combo box. If you wish to find parts from any category and any vendor that have part numbers that begin with a certain sequence of letters or numbers, set **Category** to *All*, **Vendor** to *All* and begin typing the part number in the **Part No.:** edit field. As you type, only those parts whose part numbers match the string you are typing will be displayed. If you wish to select parts whose descriptions contain a certain word or phrase, type it in the **Descr.:** edit field.

To add a part from the catalog to the purchase order, simply click and hold the left mouse button on the item, then drag it over and drop it onto the purchase order list. If the part has already been included in the purchase order, its quantity will be incremented. Another way to add a part is to simply select it in the list then click the **Add** button.

When you are done using the item catalog, click the close button ('X') in the top right corner of the catalog window.

Previewing a Purchase Order

You can preview a purchase order to see how it will look before sending it to the vendors or printing it. To preview the purchase order, select **Form | Print Preview** from the menu or click on the Print Preview toolbar button.



The print preview window will appear with an image of how the purchase order will look when it's sent or printed. You can use the buttons at the top of the window to display the next or previous pages for multi-page orders, zoom in or zoom out, and even print or send the purchase order. Below is an example of how a purchase order might look:

Purchase Agent - Lite - [StarBrite Software: Purchase Order 3]

Print... Next Page Prey Page Order Zoom In Zoom Out Close

— PURCHASE ORDER — **No. 3**

StarBrite Software
3803 Kentucky Derby Drive
Florissant, Missouri 63034
Phone: Fax:

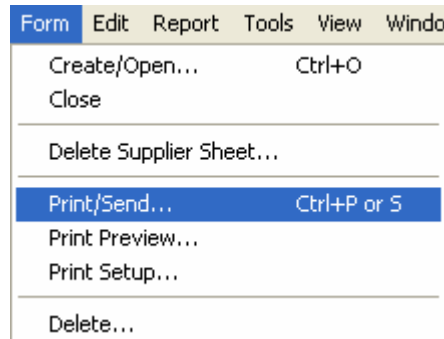
01/30/04
Page 1 of 1

Vendor McMaster-Carr 1 Industrial Way Fenton, Missouri 63165			Ship To StarBrite Software 3803 Kentucky Derby Drive Florissant, Missouri 63034		
Date Req. 01/30/04	Terms Net 30	Shipping Best Way	F.O.B. ORIGIN	Department	
Qty	Part #	Description		Cost	Total
1	9311A444512	1/4"x20 3" Zinc Plated Bolt		\$15.34	\$46.02
2	9422C1231	5/8"x15 2" Zinc Plated Bolt		\$17.65	\$17.65
				SubTotal	\$63.67
				Tax	
				Total	\$63.67

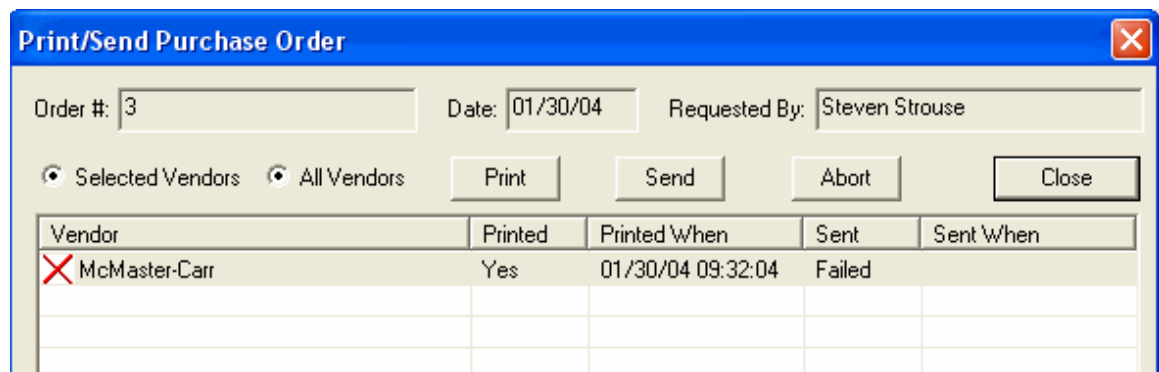
When you are finished previewing the purchase order simply click the **Close** button to close the window.

Printing/Sending Your Purchase Order

To print and/or send your purchase order, select **Form | Print/Send** from the menu or click the Print/Send toolbar button.



A dialog will be displayed that shows some information about the current purchase order, a list of the vendors and the print/send status for each, and a message box that shows information about the operation in progress.



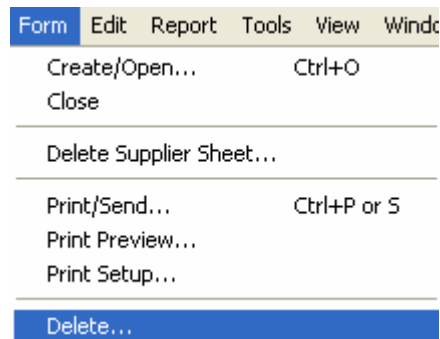
To print/send a purchase order to all vendors, select the **All Vendors** radio button, then press either the **Print** or **Send** button. Please note that if you have multiple vendors associated with a purchase order, each vendor will receive only that portion of the purchase order that pertains to the vendor. To print/send a purchase order to specific vendors select the **Selected Vendors** radio button, click on each of the desired vendors in the list, then press the **Print** or **Send** button. Before any attempts have been made to print or send a purchase order, the "Printed" and "Sent" columns in the list showing the vendors will both contain the word "No", the "When" columns will be blank and there will be a blank space before the name of each vendor. If a print or send operation is successfully completed for a vendor, the word "Yes" and the date and time the operation was completed will appear in the appropriate columns in the list. If a print or send operation fails, the word "Failed" will appear in the "Printed" or

"Sent" column and the "When" column will remain blank. To the left of the vendor name an icon will be displayed that enables you to see at a glance the status of the purchase order for that vendor. The icons are described below:

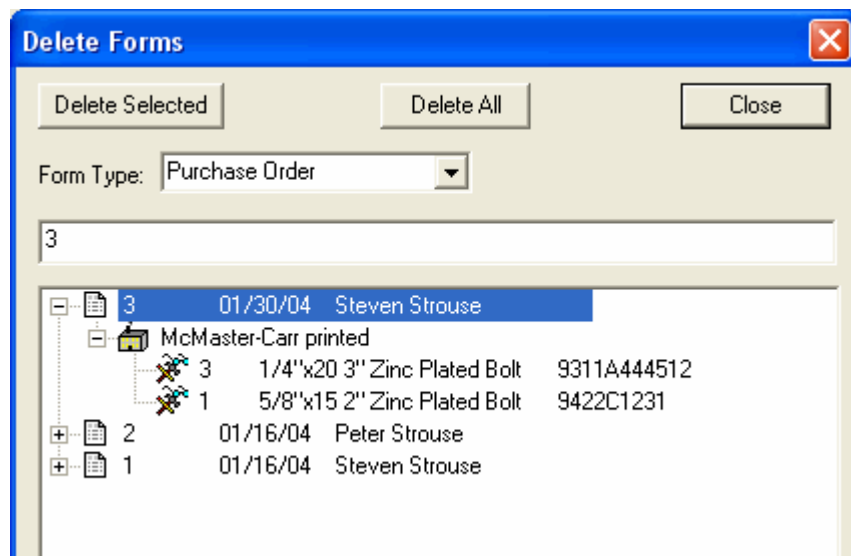
-  No attempt has been made to print or send the purchase order.
-  At least one of the operations (print or send) has failed.
-  One of the operations was successfully completed. None have failed.
-  Both the print and send operations were successfully completed.

Deleting Purchase Orders

To delete a purchase orders, select **Form | Delete** from the menu.



The following dialog will be displayed:



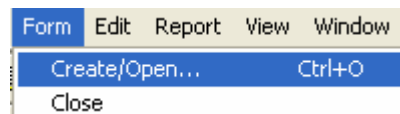
Select "Purchase Order" for the Form Type. All existing purchase orders will be displayed in the list. To display the vendors associated with a purchase order, click on the "+" next to the order number. If the purchase order has been printed and/or sent to a particular vendor, the words "printed" and/or "sent" will appear next to the vendor name. To delete a particular purchase order, click on the order number in the list then click the **Delete Selected** button. A confirmation dialog will appear to insure that you don't accidentally delete a purchase order that you intended to keep. If you answer "yes" in the confirmation dialog, the purchase order will be removed from the database. To delete a purchase orders in the database, simply click the **Delete All** button. If you answer "yes" in the resulting confirmation dialog, all existing purchase orders will be removed from the database. Click the **Close** button when you are done deleting purchase orders.

Requests for Quotations

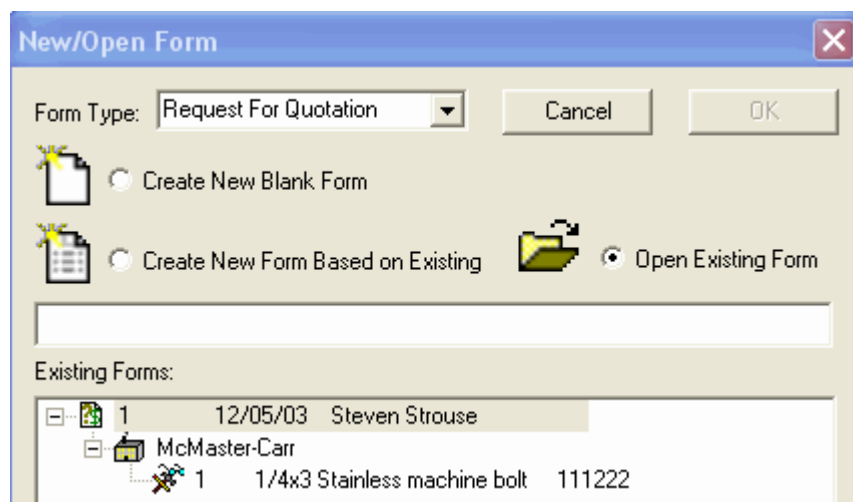
Professional looking Requests for Quotations are a snap to create, print and fax with Purchase Agent Lite..

Create/Open a Request for Quotation

Every time you log into **PAL**, the **New/Open Form** dialog will automatically appear. If you have already logged in, you can create/open a Request For Quotation (RFQ) by selecting **Form | Create/Open** from the menu.



To create or open a Request For Quotation, first select "Request For Quotation" in the **Form Type** box.



Then select one of the following:

Create New Blank Form if you wish to create a new, empty RFQ.

Create New Form Based on Existing if you wish to create an RFQ that contains the same items as an existing RFQ. After selecting this option, you must then select the existing RFQ from the **Existing Forms** list below the radio buttons.

Open Existing Form if you wish to open an existing RFQ. After selecting this option, you must then select the existing RFQ from the **Existing Forms** list below the radio buttons.

You can view the items on an RFQ by clicking the "+" next to the quotation number if you selected any of the radio buttons except **Create New Blank Form**.

Below is an example of a blank Request for Quotation.

The screenshot shows a Windows application window titled "Purchase Agent - Lite - [StarBrite Software: Request For Quote 4]". The menu bar includes File, Form, Edit, Report, View, Window, and Help. Below the menu is a toolbar with icons for file operations and help. The main form area contains several input fields and dropdown menus: "Quote #:" with a text box containing "1"; "Date:" with a date picker set to "07/08/04"; "Requester:" with a text box containing "Steven Shrouse"; "Response By:" with a date picker set to "7/12/2004"; "Delivery Date:" with a date picker set to "7/29/2004"; "Vendor Name:" with an empty text box; "Award Date:" with a date picker set to "7/15/2004"; "Deliver To:" with a dropdown menu set to "Main"; "Fax Number:", "Phone Number:", and "Attention:" each with an empty text box; "Address:" with an empty text box; "City:", "State:" (dropdown), and "Zip Code:" each with an empty text box; and a "More Information..." button. On the right side, there is a text area displaying the address: "1 Industrial Drive", "Anytown, Missouri", "63031". At the bottom of the form is a large table with 8 columns: Qty, Part Number, Description, Qty/Unit, Unit Price, Disc. Qty, and Discount. The table is currently empty. The status bar at the very bottom shows "Ready" and some small icons.

Filling Out a Request for Quotation

Here are the steps to filling out a request for quotation:

- 1) **Enter quote number** - If you wish to specify a **Quote #** other than the one supplied, simply click in the box and type it in. Press the tab key to go to the next field.
- 2) **Select a response by date** - If the date by which you require a response to the request for quotation is not displayed in the **Response By** box, click on the down arrow on the right side of the box. A pop-up calendar will be displayed from which you can select the appropriate date. Press the tab key to go to the next field.
- 3) **Select a delivery date** - If the date by which you require the quoted items to be delivered is not displayed in the **Delivery Date** box, click on the down arrow on the right side of the box. A pop-up calendar will be displayed from which you can select the appropriate date. Press the tab key to go to the next field.
- 4) **Enter the vendor name** - Left click in the **Vendor Name** box and type in the name of the vendor. Press the tab key to go to the next field.
- 5) **Select an award date** - If the date by which you expect to award the contract for the quoted items is not displayed in the **Award Date** box, click on the down arrow on the right side of the box. A pop-up calendar will be displayed from which you can select the appropriate date. Press the tab key to go to the next field.
- 6) **Select the deliver to address** - If the address to which the purchased items will be shipped is not displayed in the **Deliver To** box, simply click on the down arrow on the right side of the box and select it from the list. Press the tab key to go to the next field. This address may be important if shipping costs have to be figured into the quote. Press the tab key to go to the next field.
- 7) **Enter the vendor's fax number** - This is a critical field and it must be supplied if you wish to have your request for quotation faxed to the vendor. Left click in the **Fax Number** box and type the telephone number of the vendor's fax machine exactly as it would have to be dialed from a phone inside your company. Examples: 818005554343 or 8-1-800-555-4343 (long distance toll free from inside a company); 95554343 or 9-555-4343 (local from inside a company); 5554343 or 555-4343 (local from your home). Press the tab key to go to the next field.
- 8) **Enter the vendor's phone number** - This information appears on the printed/sent request for quotation. It is used mainly for reference and is

not required. To enter it, simply click in the **Phone Number** box and type it in. Press the tab key to go to the next field.

- 9) **Enter the vendor contact** - This is the name of the vendor contact that will appear on the request for quotation with the label "Attn:". Left click in the **Attention** box and type the name of the vendor contact. Press the tab key to go to the next field.
- 10) **Enter address, city, state/region, zip/postal code** - Information entered in these fields will appear on the printed/sent request for quotations. To enter the Address, City or Zip code, simply click in the appropriate box and type them in. To enter the State/Region just click on the down arrow on the right side of the box and select it. If it doesn't appear in the box, just type it in.
- 11) **Specify freight, payment terms and special instructions** - To specify freight, payment terms or any special instructions click on the **More Information** button. The following dialog will appear:

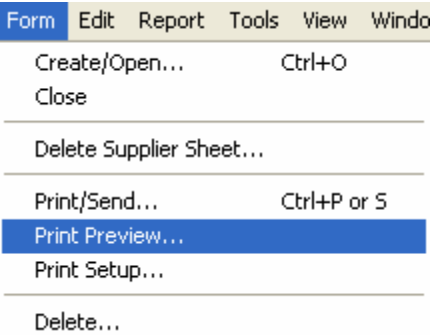
To specify how freight will be handled, click on the down arrow to the right of the box labeled **Freight** and select from the list. To specify payment terms click on the down arrow to the right of the box labeled **Payment Terms** and select from the list. Both the freight and payment terms selections will appear on the sent or printed request for quotation. If you wish to include special instructions for the vendor, click in the large box at the bottom and type them in. If you routinely use the same special

instructions for different quotes, you can save them as a user defined set. To do this, type the special instructions that you want to save as a set in the large box. Next, type a short description in the combo box labeled **User Defined** and then click the **Save** button. To use a user defined set in another quotation, select its description from the combo box, then check the box next to the label, **User Defined**. When all your selections have been made, click the **OK** button to save them and return to the main request for quotation screen.

- 12) **Add items to be quoted** - Below the various boxes at the top of the request for quotation form is a list for entering the items you wish to have quoted. If you know the part number, then type it in the Part Number field. If you don't then just leave it blank and hopefully the vendor will supply it with your quotation. Type a description of the item you wish to buy in the Description field. Repeat this step for as many items as you would like to have quoted.

Previewing a Request for Quotation

You can preview a request for quotation to see how it will look before sending it to the vendor or printing it. To preview the request, select **Form | Print Preview** from the menu or click on the Print Preview toolbar button.



The print preview window will appear with an image of how the request for quotation will look when it's sent or printed. You can use the buttons at the top of the window to display the next or previous pages for multi-page requests, zoom in or zoom out, and even print or send the request. Below is an example of how a request for quotation might look:

Purchase Agent - Lite - [StarBrite Software: Request For Quote 1]

Print Next Page Prev Page Order Zoom In Zoom Out Close

==REQUEST FOR QUOTATION== No. 1

StarBrite Software
 3344 QuickWay Drive
 Cuba, Missouri 64264
 Phone: Fax:

01/30/04
 Page 1 of 1

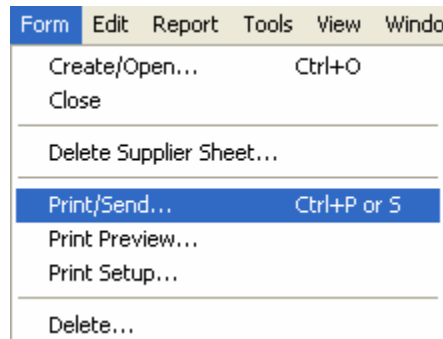
Vendor McMaster-Carr 1 Industrial Way Fenton, 63162			Ship To StarBrite Software 3344 QuickWay Drive Cuba, Missouri 64264		
Close Date	Award Date	Delivery Date	Payment Terms	Freight	

	Qty	Part #	Description	Qty/Unit	Unit Price	DQty	Disc
1	3	MT60-AA6232	Motor				

When you are finished previewing the request for quotation simply click the **Close** button to close the window.

Printing/Sending Your Request for Quotation

To print and/or send your request for quotation, select **Form | Print/Send** from the menu or click the Print/Send toolbar button.



A dialog will be displayed that shows some information about the request for quotation, its print/send status and a message box that displays information about any operation in progress.

 A screenshot of a dialog box titled 'Print/Send Request for Quotation'. It contains the following fields and controls:

- RFQ #: 1
- Date: 01/16/04
- Requested By: Steven Strouse
- Vendor Name: McMaster-Carr
- Print button (with printer icon)
- Print Status: No
- Last Printed: (empty text box)
- Close button
- Send button (with printer icon)
- Send Status: No
- Last Sent: (empty text box)
- Abort button

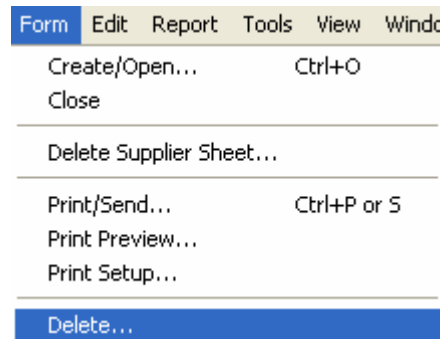
To print the request for quotation, simply click on the **Print** button. If the printing operation succeeds, the **Print Status** box will display "Yes" and the **Last Printed** box will display the date and time the request was printed.

To send the request for quotation to the specified vendor, simply click the **Send** button. If the send operation succeeds, the Send Status box will display "Yes" and the Last Sent box will display the date and time the request was sent.

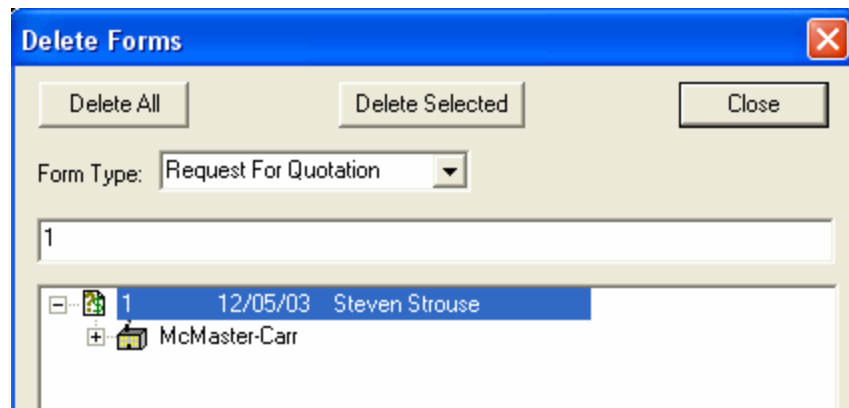
If either the print or send operation fails, its corresponding status box will contain "Failed" and no time stamp will be recorded.

Deleting a Request for Quotation

To delete a request for quotation (RFQ), select **Form | Delete** from the menu.



The following dialog will be displayed:



Select "Request For Quotation" for the Form Type. All existing RFQs will be displayed in the list. To display the vendors associated with a request for quotation, click on the "+" next to the RFQ number. If the request for quotation has been printed and/or sent to a particular vendor, the words "printed" and/or "sent" will appear next to the vendor name. To delete a particular request for quotation, click on the quote number in the list then click the **Delete Selected** button. A confirmation dialog will appear to insure that you don't accidentally delete a request for quotation that you intended to keep. If you answer "yes" in the confirmation dialog, the request for quotation will be removed from the database. To delete all RFQs in the database, simply click the **Delete All** button. If you answer "yes" in the resulting confirmation dialog, all existing RFQs will be removed from the database. Click the **Close** button when you are done deleting RFQs.

Section

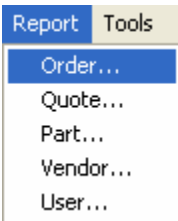
6

Reports

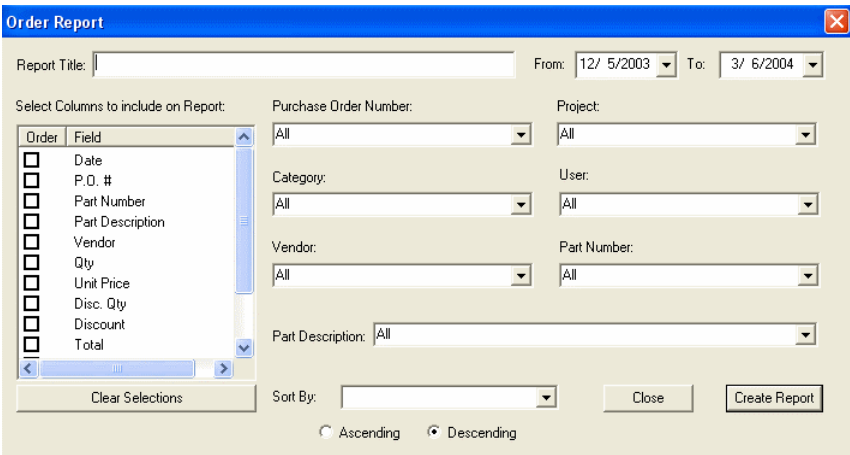
Generate comprehensive reports on all of your purchasing and request for quotation activities.

Creating a Purchase Order Report

Every software package used in business must be capable of generating reports. PAL's reporting software was designed to be simple to use but highly flexible. The first step to creating a purchase order report is to select **Report | Order...** from the menu.



The **Order Report** dialog will appear.



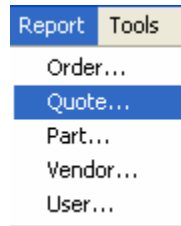
Perform the following steps to finish creating your purchase order report.

- 1) Type the title of your report in the **Report Title** edit box. If you leave this field blank, your report will be titled, "Purchase Order Report".
- 2) Choose the reporting period by selecting a date in the **From** and **To** calendar controls.
- 3) Choose the purchase order fields that you wish to have included in the report. The list control labeled, "Select Columns to include on Report", contains the names of a number of the key purchase order fields with a checkbox beside each one. To select a field for inclusion in your report, simply click on the checkbox next to the field's name. The order in which you select each field will determine the order of the columns in your report. If you make a mistake and accidentally check a field that you don't wish to include on the report, simply uncheck it. If you want to change the order of the columns, simply press the **Clear Selections** button and start over.
- 4) Choose your report constraints by selecting from the various combo boxes to the right of the field list. If all of the combo boxes contain the word, "All", then the report you generate will contain the selected fields from all of the purchase orders in the selected time period. To further illustrate how this works, suppose that you wish to see the selected fields from only those purchase orders where "fasteners" were purchased from "McMaster-Carr". You would select "fasteners" in the **Category** combo box and "McMaster-Carr" in the **Vendor** combo box. All other combo boxes would contain the word, "All".
- 5) Choose which of the fields will be used to sort the items on the report by selecting it from the **Sort By** combo box. Items will be arranged in the report in either ascending or descending alphabetical order depending on which of the two radio buttons below the **Sort By** combo box is selected.
- 6) Create the report by clicking on the **Create Report** button. A new window will appear underneath the Order Report dialog containing the report results. You can create as many reports as you like by repeating steps 1 through 6. Each report will overlay the previous one unless you close each one before opening a new one. You can have any number of reports open at the same time for comparison. At the top of each report window is a menu that allows you to print, print preview and close the report.

When you are finished creating purchase order reports, click the **Close** button.

Creating a Request for Quotation Report

The first step to creating a requests for quotation report is to select **Report | Quote...** from the menu.



The **Quote Report** dialog will appear.

 A screenshot of the 'Request for Quotation Report' dialog box. It has a blue title bar and a light beige background.

- Report Title:** An empty text box.
- From:** A date picker set to '12/ 5/2003'.
- To:** A date picker set to '3/19/2004'.
- Select Columns to include on Report:** A list box with a table:

Order	Field
☐	Date
☐	Quote #
☐	Part Number
☐	Part Description
☐	Vendor
☐	Qty
☐	Close Date
☐	Award Date
☐	Deliver Date

 Below the list is a 'Clear Selections' button.
- Request for Quote Number:** A dropdown menu set to 'All'.
- User:** A dropdown menu set to 'All'.
- Vendor:** A dropdown menu set to 'All'.
- Part Number:** A dropdown menu set to 'All'.
- Part Description:** A dropdown menu set to 'All'.
- Sort By:** A dropdown menu.
- Ascending:** A radio button.
- Descending:** A radio button (selected).
- Buttons:** 'Close' and 'Create Report' buttons at the bottom right.

Perform the following steps to finish creating your requests for quotation report.

- 1) Type the title of your report in the **Report Title** edit box. If you leave this field blank, your report will be titled, "Request for Quotation Report".
- 2) Choose the reporting period by selecting a date in the **From** and **To** calendar controls.
- 3) Choose the request for quotation fields that you wish to have included in the report. The list control labeled, "Select Columns to include on Report", contains the names of a number of the key request for quotation fields with a checkbox beside each one. To select a field for inclusion in your report, simply click on the checkbox next to the field's name. The order in which you select each field will determine the order of the columns in your report. If you make a mistake and accidentally check a field that you don't wish to include on the

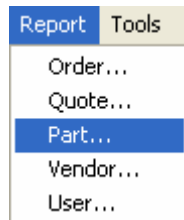
report, simply uncheck it. If you want to change the order of the columns, simply press the **Clear Selections** button and start over.

- 4) Choose your report constraints by selecting from the various combo boxes to the right of the field list. If all of the combo boxes contain the word, "All", then the report you generate will contain the selected fields from all of the requests for quotation in the selected time period. To further illustrate how this works, suppose that you wish to see the selected fields from only those quotes where "fasteners" were quoted from "McMaster-Carr". You would select "fasteners" in the **Category** combo box and "McMaster-Carr" in the **Vendor** combo box. All other combo boxes would contain the word, "All".
- 5) Choose which of the fields will be used to sort the items on the report by selecting it from the **Sort By** combo box. Items will be arranged in the report in either ascending or descending alphabetical order depending on which of the two radio buttons below the **Sort By** combo box is selected.
- 6) Create the report by clicking on the **Create Report** button. A new window will appear underneath the Quote Report dialog containing the report results. You can create as many reports as you like by repeating steps 1 through 6. Each report will overlay the previous one unless you close each one before opening a new one. You can have any number of reports open at the same time for comparison. At the top of each report window is a menu that allows you to print, print preview and close the report.

When you are finished creating reports, click the **Close** button.

Creating a Parts Report

The first step to creating a report of the parts in your database is to select **Report | Part...** from the menu.



The **Part Report** dialog will appear.

Part Report

Report Title:

Select Columns to include on Report:

Order	Field
☐	Part Number
☐	Part Description
☐	Vendor
☐	Qty/Unit
☐	Unit Price
☐	Def. Qty
☐	Disc. Qty
☐	Discount

Vendor:

Part Number:

Part Description:

Sort By:

Category:

☐ Ascending ☒ Descending

Perform the following steps to finish creating your parts report.

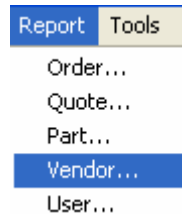
- 1) Type the title of your report in the Report Title edit box. If you leave this field blank, your report will be titled, "Part Report".
- 2) Choose the part fields that you wish to have included in the report. The list control labeled, "Select Columns to include on Report", contains the names of a number of the key part fields with a checkbox beside each one. To select a field for inclusion in your report, simply click on the checkbox next to the field's name. The order in which you select each field will determine the order of the columns in your report. If you make a mistake and accidentally check a field that you don't wish to include on the report, simply uncheck it. If you want to change the order of the columns, simply press the Clear Selections button and start over.
- 3) Choose your report constraints by selecting from the various combo boxes to the right of the field list. If all of the combo boxes contain the word, "All", then the report you generate will contain the selected fields from all of the parts in the database. To further illustrate how this works, suppose that you wish to see the selected fields from all the parts in the database that you buy from "McMaster-Carr" that belong to the category "fasteners". You would select "fasteners" in the Category combo box and "McMaster-Carr" in the Vendor combo box. All other combo boxes would contain the word, "All".
- 4) Choose which of the fields will be used to sort the items on the report by selecting it from the Sort By combo box. Items will be arranged in the report in either ascending or descending alphabetical order depending on which of the two radio buttons below the Sort By combo box is selected.

- 5) Create the report by clicking on the Create Report button. A new window will appear underneath the Part Report dialog containing the report results. You can create as many reports as you like by repeating steps 1 through 6. Each report will overlay the previous one unless you close each one before opening a new one. You can have any number of reports open at the same time for comparison. At the top of each report window is a menu that allows you to print, print preview and close the report.

When you are finished creating reports, click the Close button.

Creating a Vendor Report

The first step to creating a report of the vendors in your database is to select Report | Vendor... from the menu.



The Vendor Report dialog will appear.

 A screenshot of the 'Vendor Report' dialog box. The title bar is blue with the text 'Vendor Report' and a close button. Inside the dialog:

- 'Report Title:' is followed by a text box containing 'Vendor Report'.
- 'Select Columns to include on Report:' is followed by a list box with columns 'Order' and 'Field'. The 'Field' column lists: Vendor, Account Number, Fax Number, Address, City, State/Region, Country, Zip/Postal Code, and Email. Each item has an unchecked checkbox to its left.
- Below the list box is a 'Clear Selections' button.
- On the right side, there are several dropdown menus: 'Vendor:' (set to 'All'), 'Account Number:' (set to 'All'), 'City:' (set to 'All'), 'State/Region:' (set to 'All'), 'Postal Code:' (set to 'All'), and 'Country:' (set to 'All').
- Below these is a 'Sort By:' dropdown menu.
- At the bottom, there are radio buttons for 'Ascending' and 'Descending' (the 'Descending' option is selected).
- At the bottom right are two buttons: 'Close' and 'Create Report'.

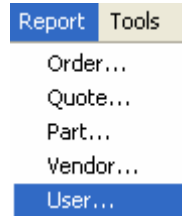
Perform the following steps to finish creating your parts report.

- 1) Type the title of your report in the Report Title edit box. If you leave this field blank, your report will be titled, "Vendor Report".
- 2) Choose the vendor fields that you wish to have included in the report. The list control labeled, "Select Columns to include on Report", contains the names of a number of the key vendor fields with a checkbox beside each one. To select a field for inclusion in your report, simply click on the checkbox next to the field's name. The order in which you select each field will determine the order of the columns in your report. If you make a mistake and accidentally check a field that you don't wish to include on the report, simply un-check it. If you want to change the order of the columns, simply press the Clear Selections button and start over.
- 3) Choose your report constraints by selecting from the various combo boxes to the right of the field list. If all of the combo boxes contain the word, "All", then the report you generate will contain the selected fields from all of the vendors in the database. To further illustrate how this works, suppose that you wish to see the selected fields from all the vendors in the database that are located in Missouri. You would select "Missouri" in the State/Region combo box. All other combo boxes would contain the word, "All".
- 4) Choose which of the fields will be used to sort the items on the report by selecting it from the Sort By combo box. Items will be arranged in the report in either ascending or descending alphabetical order depending on which of the two radio buttons below the Sort By combo box is selected.
- 5) Create the report by clicking on the Create Report button. A new window will appear underneath the Part Report dialog containing the report results. You can create as many reports as you like by repeating steps 1 through 6. Each report will overlay the previous one unless you close each one before opening a new one. You can have any number of reports open at the same time for comparison. At the top of each report window is a menu that allows you to print, print preview and close the report.

When you are finished creating reports, click the Close button.

Creating a User Report

The first step to creating a report of the authorized users of **PAL** in your database is to select **Report | User...** from the menu.



The **User Report** dialog will appear.

A screenshot of the 'User Report' dialog box. The dialog has a title bar with a close button. Inside, there is a 'Report Title:' field with 'User Report' entered. Below this is a section 'Select Columns to include on Report:' containing a list of fields with checkboxes: 'User Name', 'First Name', 'Middle Name', 'Last Name', 'Address', 'City', 'State/Region', 'Country', and 'Zip/Postal Code'. To the right of this list are several dropdown menus for filtering: 'Last Name:' (All), 'Address:' (All), 'City:' (All), 'State/Region:' (All), 'Postal Code:' (All), and 'Country:' (All). There is also a 'Sort By:' dropdown menu. At the bottom, there are radio buttons for 'Ascending' and 'Descending' (selected), and two buttons: 'Close' and 'Create Report'. A 'Clear Selections' button is located below the column list.

Perform the following steps to finish creating your users report.

- 1) Type the title of your report in the Report Title edit box. If you leave this field blank, your report will be titled, "User Report".
- 2) Choose the user fields that you wish to have included in the report. The list control labeled, "Select Columns to include on Report", contains the names of a number of the key user fields with a checkbox beside each one. To select a field for inclusion in your report, simply click on the checkbox next to the field's name. The order in which you select each field will determine the order of the columns in your report. If you make a mistake and accidentally check a field that you don't wish to include on the report, simply un-check it. If you want to change the order of the columns, simply press the Clear Selections button and start over.
- 3) Choose your report constraints by selecting from the various combo boxes to the right of the field list. If all of the combo boxes contain the word, "All", then the report you generate will contain the selected fields from all of the users in the database.
- 4) Choose which of the fields will be used to sort the items on the report by selecting it from the Sort By combo box. Items will be arranged in the report in either ascending or descending alphabetical order depending on which of the two radio buttons below the Sort By combo box is selected.
- 5) Create the report by clicking on the Create Report button. A new window will appear underneath the Part Report dialog containing the report results. You can create as many reports as you like by repeating steps 1 through 6. Each report will overlay the previous one unless you close each one before opening a new one. You can have any number of reports open at the same time for comparison. At the top of each report window is a menu that allows you to print, print preview and close the report.

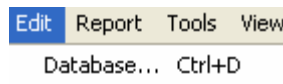
When you are finished creating reports, click the Close button.

The Database

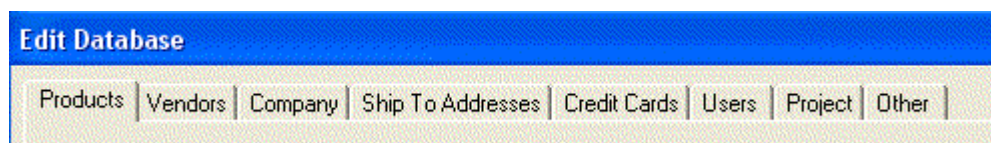
Purchase Agent Lite keeps all the information you provide in a database for instant access each time it's needed.

Editing the Database

To edit the database, select **Edit | Database...** from the menu or click the Edit Database toolbar button or press Ctrl+D.



The Edit Database tabbed dialog provides a convenient means for managing information in the database. It allows you to add, update, and remove products, vendors, companies, ship to address, credit cards, users, projects, categories, and other information in the database. In general, each tab has a list box or tree control on the left that displays existing database entries. When you click on one of the entries, information about the entry will appear in the controls to the right. To add an entry, fill in all of the required fields on the right, and then click the **Add** button. To update an entry, first select the entry, make the necessary changes in the fields to the right, and then click the **Update** button. To delete an entry, first select it then click the **Delete** button. You will then be prompted to confirm that you really wanted to delete the entry to prevent accidental deletions. Finally, when all of your changes have been made, you must click the **OK** button at the bottom of the dialog if you wish to make your changes permanent. If you click the **Cancel** button, none of the changes you made will be kept.



Edit Products

This form allows you to manage all products in the database.

To open this form, select **Edit | Database...** from the menu or click the Edit Database toolbar button or press Ctrl+D then select the **Products** tab. On the left side of the form is a tree control that lists products either by category or vendor. Click on the **Category** radio button above the list if you wish to display all products grouped by category. Click on the **Vendor** radio button above the list if you wish to display all products grouped by vendor. On the right side of the form are the boxes for viewing/editing information about the products. At the bottom of the form are buttons to add, update or delete products from the database.

Add a Product

To add a product to the database, perform the following steps:

- 1) Fill in all the boxes on the right side of the form. See Filling in the Form below.
- 2) Click the **Add** button at the bottom of the form. After you click the **Add** button, the list will be updated and the product will show up under the appropriate category or vendor.

Update a Product

To update product information, perform the following steps:

- 1) Select the product from the list on the left side of the form. The boxes on the right side of the form will be filled in with the product information.
- 2) Change the appropriate information in the boxes on the right of the form.
- 3) Click the **Update** button at the bottom of the form.

Delete a Product

To delete a product from the database, perform the following steps:

- 1) Select the product from the list on the left side of the form.
- 2) Click the **Delete** button at the bottom of the form.
- 3) Click the **Yes** button in the confirmation dialog.

Filling in the Product Form

For all of the boxes except the **Category** and **Vendor** boxes, simply click in the box and begin typing. For the **Category** or **Vendor** boxes, simply click on the down arrow next to the box, then make a selection from the list. If the desired entry is not in the list, then type it in the box. When you are finished entering information for one field, press the **Tab** or **Enter** key to move on to the next field. Below is a description of each field:

Description - A description of the product that can be up to 255 alphanumeric characters long.

Part Number - Part or catalog number that the vendor uses to identify the product. This field can be up to 50 alphanumeric characters long.

Category - Category to which this product will be assigned. Products can be sorted by vendor or category, so it is important to supply a category for the product. Select the appropriate category from the combo box. If the category that you want to assign is not in the list, type it in and it will be added to the database.

Vendor - Vendor from which you will be purchasing the product. If you type the name of a vendor that doesn't exist in the database, the Add New Vendor dialog will be displayed.

Unit Price - Price of product from vendor's catalog or quotation. This field can be left blank if the unit price is not known.

Default Quantity - The value that you enter here will be used when a product is added to a purchase order from the Item Catalog.

Quantity Per Unit - Use this field to specify the number of pieces that comprise a unit of the product (i.e. 500 sheets or 50 pcs.)

Discount - If the vendor offers a discount for a quantity of units in excess of a certain number, enter the discount percentage in this field. Your discount will automatically be calculated if the quantity of units you specified for purchase exceeds the value in the Units Required for Discount field. This field should be zero if the vendor doesn't offer any discounts.

Units Required for Discount - The value you enter here is the number of units that the specified vendor requires you to meet or exceed to receive the Discount percentage. This field should be zero if the vendor doesn't offer a discount.

Edit Vendors

This form allows you to manage all vendors in the database.

To open this form, select **Edit | Database...** from the menu or click the Edit Database toolbar button or press Ctrl+D then select the **Vendors** tab. On the left side of the form is a list control that displays all of the vendors in the database. On the right side are the boxes for entering information about the vendor. At the bottom of the form are buttons to add, update or delete vendors from the database.

Add a Vendor

To add a vendor to the database, perform the following steps:

- 1) Fill in all the boxes on the right side of the form. See **Filling in the Form** below.
- 2) Click the **Add** button at the bottom of the form. After you click the **Add** button, the list will be updated and the vendor will show up in the list.

Update a Vendor

To update vendor information, perform the following steps:

- 1) Select the vendor from the list on the left side of the form. The boxes on the right side of the form will be filled in with the vendor information.
- 2) Change the appropriate information in the boxes on the right of the form.
- 3) Click the **Update** button at the bottom of the form.

Delete a Vendor

To delete a vendor from the database, perform the following steps:

- 1) Select the vendor from the list on the left side of the form.
- 2) Click the **Delete** button at the bottom of the form.
- 3) Click the **Yes** button in the confirmation dialog.

Filling in the Vendor Form

For all of the boxes except the **State/Region** box, simply click in the box and begin typing. For the **State/Region** box, simply click on the down arrow next to the box, then make a selection from the list. If the desired entry is not in the list, then type it in the box. When you are finished entering information for one field, press the **Tab** or **Enter** key to move on to the next field. Below is a description of each field:

Vendor Name - This is the name that will appear in the vendor selection boxes and on the printed or faxed Purchase Order.

Fax Number - Type the telephone number of the vendor's fax machine in this field exactly as it would have to be dialed from a phone inside your company. Examples: 818005554343 or 8-1-800-555-4343 (long distance toll free from inside a company); 95554343 or 9-555-4343 (local from inside a company); 5554343 or 555-4343 (local from your home)

Tax Rate - Tax percentage the vendor will charge for your order.

Account Number - If you have established an account number with the vendor, type it in here. If you select "Vendor Account" in the Payment box on a purchase order this number will appear in the box below it and on the printed or faxed purchase order.

Address, City, State/Region, Zip/Postal Code - Information entered in these fields will appear on the printed and faxed purchase order.

Country, Email, Internet Address, Notes - Information entered in these fields will **not** appear on the printed and faxed purchase order. They are for reference only.

Contact Name, Contact Phone - Information entered in these fields will appear on the printed and faxed purchase order.

Edit Companies

When you started **PAL** for the first time you were asked to enter information about your company. This form allows you to change that information. It also allows you to manage additional companies if you are performing purchasing duties for more than one company.

To open this form, select **Edit | Database...** from the menu or click the Edit Database toolbar button or press Ctrl+D then select the **Company** tab. On the left side of the form is a list control that displays all of your companies in the database. On the right side are the boxes for entering information about each company. At the bottom of the form are buttons to add, update or delete companies from the database.

Add a Company

To add a company to the database, perform the following steps:

- 1) Fill in all the boxes on the right side of the form. See **Filling in the Form** below.
- 2) Click the **Add** button at the bottom of the form. After you click the **Add** button, the list will be updated and the company will show up in the list.

Update a Company

To update company information, perform the following steps:

- 1) Select the company from the list on the left side of the form. The boxes on the right side of the form will be filled in with the company information.
- 2) Change the appropriate information in the boxes on the right of the form.
- 3) Click the **Update** button at the bottom of the form.

Delete a Company

To delete a company from the database, perform the following steps:

- 1) Select the company from the list on the left side of the form.
- 2) Click the **Delete** button at the bottom of the form.
- 3) Click the **Yes** button in the confirmation dialog.

Filling in the Company Form

For all of the boxes except the **State/Region** box, simply click in the box and begin typing. For the **State/Region** box, simply click on the down arrow next to the box, and then make a selection from the list. If the desired entry is not in the list, then type it in the box. When you are finished entering information for one field, press the **Tab** or **Enter** key to move on to the next field. Below is a description of each field:

Company Name, Address, City, State/Region, Zip/Postal Code, Phone Number, Fax Number - Information entered in these fields will appear on the printed and faxed purchase order.

Country, Internet Address, Email - Information entered in these fields will **not** appear on the printed and faxed purchase order. They are for reference only.

Edit Ship To Address

When you started **PAL** for the first time you were asked to enter the address information of your company. This initial address information is stored in the database under the heading "Main" representing the main ship to address for your company. The "Ship To Addresses" form allows you to manage all the ship to addresses for all your companies.

To open this form, select **Edit | Database...** from the menu or click the Edit Database toolbar button or press Ctrl+D then select the **Ship To Addresses** tab. On the left side of the form is a tree control that displays all of your companies in the database and the ship to addresses associated with each one. On the right side are the boxes for entering information about each ship to address. At the bottom of the form are buttons to add, update or delete ship to addresses from the database.

Add a Ship To Address

To add a ship to address to the database, perform the following steps:

- 1) Select the company from the tree control on the left side of the form or from the **Company** combo box on the right side of the form.
- 2) Fill in all the boxes on the right side of the form. See **Filling in the Form** below.
- 3) Click the **Add** button at the bottom of the form. After you click the **Add** button, the tree will be updated and the new ship to address will show up under the selected company label.

Update a Ship To Address

To update ship to information, perform the following steps:

- 1) Select the ship to address from the tree control on the left side of the form. The boxes on the right side of the form will be filled in with the address information.
- 2) Change the appropriate information in the boxes on the right of the form.
- 3) Click the **Update** button at the bottom of the form.

Delete a Ship To Address

To delete a ship to address from the database, perform the following steps:

- 1) Select the address from the control on the left side of the form.
- 2) Click the **Delete** button at the bottom of the form.
- 3) Click the **Yes** button in the confirmation dialog.

Filling in the Ship to Address Form

For all of the boxes except the **State/Region** and **Company** boxes, simply click in the box and begin typing. For the **State/Region** or **Company** box, simply click on the down arrow next to the box, and then make a selection from the list. If the desired entry for **State/Region** is not in the list, then type it in the box. If the desired entry for **Company** is not in the box then you must go back to the Company tab and add it before adding a ship to address. When you are finished entering information for one field, press the **Tab** or **Enter** key to move on to the next field. Below is a description of each field:

Company - This combo box contains the names of all the companies currently in the database. The company to which a given ship to address is associated will appear here.

Address Label - Information entered in this field will be used to identify the different ship to addresses associated with a company. On the main purchase order form there is a combo box that allows you to choose to which address the vendor will ship your purchases. The Address Label for each ship to address for a company will appear in this combo box

Address, City, State/Region, Zip/Postal Code, Name, Phone - Information entered in these fields will appear on the printed and faxed purchase order in the Ship To address box.

Country, Fax Number, Email - Information entered in these fields will **not** appear on the printed and faxed purchase order. They are for reference only.

Edit Credit Cards

With most vendors you will establish a purchasing account and be given an account number. For this type of account you will enter the account number on the Vendor form. However, under certain circumstances, you may need to purchase items with a credit card. This form allows you to enter the information for one or more credit cards that can then be selected as the payment method when creating a purchase order.

To open this form, select **Edit | Database...** from the menu or click the Edit Database toolbar button or press Ctrl+D then select the **Credit Cards** tab. On the left side of the form is a tree control that displays all of your companies in the database and the credit cards associated with each one. On the right side are the boxes for entering information about each credit card. At the bottom of the form are buttons to add, update or delete credit cards from the database.

Add a Credit Card

To add a credit card to the database, perform the following steps:

- 1) Select the company from the tree control on the left side of the form or from the **Company** combo box on the right side of the form.
- 2) Fill in all the boxes on the right side of the form. See **Filling in the Form** below.
- 3) Click the **Add** button at the bottom of the form. After you click the **Add** button, the tree will be updated and the new credit card will show up under the selected company label.

Update a Credit Card

To update credit card information such as the expiration date, perform the following steps:

- 1) Select the credit card from the tree control on the left side of the form. The boxes on the right side of the form will be filled in with the credit card information.
- 2) Change the appropriate information in the boxes on the right of the form.
- 3) Click the **Update** button at the bottom of the form.

Delete a Credit Card

To delete a credit card from the database, perform the following steps:

- 1) Select the credit card from the control on the left side of the form.
- 2) Click the **Delete** button at the bottom of the form.
- 3) Click the **Yes** button in the confirmation dialog.

Filling in the Credit Card Form

For all of the boxes that don't have a down arrow, simply click in the box and begin typing. For the all the boxes that do have a down arrow next to them, simply click on the down arrow, then make a selection from the list. If the desired entry for **Company** is not in the box then you must go back to the Company tab and add it before adding a credit card. When you are finished entering information for one field, press the **Tab** or **Enter** key to move on to the next field. Below is a description of each field:

Company - This combo box contains the names of all the companies currently in the database. The company to which a given credit card is associated will appear here.

Label - Information entered in this field will be used to identify the different credit cards associated with a company. On the main purchase order form there is a combo box labeled **Payment** that allows you to choose how your vendor will be paid. The Label for each credit card will appear in this combo box.

Card Type – Choose the type of credit card you will be using by selecting it from this combo box. If you do not find your credit card type in the list, simply click in the box and type it in.

Expiration Date: Month and Year – Select the month and year that your card will expire.

Name on Card – Type the name exactly as it appears on the card in this box.

Account Number – Type the account number exactly as it appears on the card in this box. If the Name on Card and Account Number do not match, the credit card transaction will be void

Edit Users

When you started **PAL** for the first time you were asked to enter some information about yourself. This initial information forms the basis of your user profile. **PAL** automatically adds your user profile to the database and authorizes you to make purchases and requests for quotations. If you wish to authorize additional employees to use **PAL**, you must add user profiles for them.

To open this form, select **Edit | Database...** from the menu or click the Edit Database toolbar button or press Ctrl+D then select the **Users** tab. On the left side of the form is a list control that displays all of the users authorized to use **PAL**. On the right side are the boxes for entering information about each user. At the bottom of the form are buttons to add, update or delete users from the database.

Add a User

To add a user profile to the database, perform the following steps:

- 1) Fill in all the boxes on the right side of the form. See **Filling in the Form** below.
- 2) Click the **Add** button at the bottom of the form. After you click the **Add** button, the name of the new user will appear in the list.

Update a User

To update a user profile, perform the following steps:

- 1) Select the name of the user from the list control on the left side of the form. The boxes on the right side of the form will be filled in with the user's information.
- 2) Change the appropriate information in the boxes on the right of the form.
- 3) Click the **Update** button at the bottom of the form.

Delete a User

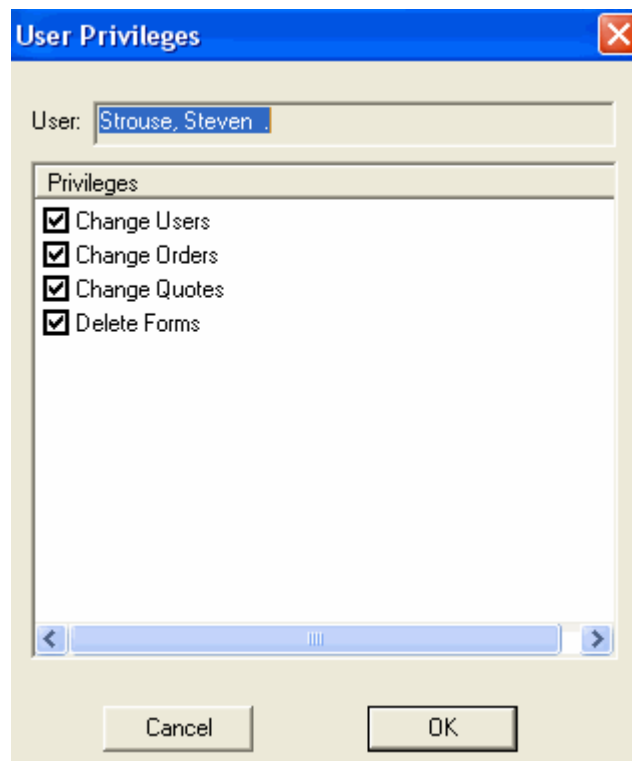
To delete a user profile from the database, perform the following steps:

- 1) Select the user's name from the control on the left side of the form.
- 2) Click the **Delete** button at the bottom of the form.
- 3) Click the **Yes** button in the confirmation dialog.

Change Access Privileges

By default when you add a new user profile to the database, that person is granted access to all the functionality of the program. If you wish to limit the access of certain users, you can do so by changing their access privileges. Perform the following steps to change the access privileges of a user:

- 1) Select the user's name from the control on the left side of the form.
- 2) Click the Privileges... button below the list control. The following dialog will appear:



- 3) Check the boxes next to the privileges you wish the selected user to have. Uncheck the boxes next to the privileges that you wish to deny the user.

4) Click the **OK** button.

Please Note: If the **Privileges...** button is grayed out, you do not have access to change anyone else's access.

Filling in the User Profile Form

For all of the boxes except the **State/Region** box, simply click in the box and begin typing. For the **State/Region** box, simply click on the down arrow next to the box, and then make a selection from the list. If the desired entry for **State/Region** is not in the list, then type it in the box. When you are finished entering information for one field, press the **Tab** or **Enter** key to move on to the next field. Below is a description of each field:

Login Name - The text you enter in this field along with your password will be used to identify you as an authorized user of the **PAL**.

Password, Confirm Password - A password is not required for you to use **PAL**, but it is recommended. Your login name along with a password serves as an electronic signature. Since your purchase orders and quotes are faxed directly from your computer, it isn't possible to use a handwritten signature. Without a password, you have no way to guarantee that you authorized the purchase order or request for quote. The password you use can be any number of letters or numbers, just make sure you type the same password in both the **Password** and **Confirm Password** boxes.

Please Note: Login names and passwords are case sensitive. The way that you enter them in this form will also be the way that you enter them in the login dialog that appears when you first start the program.

First Name, Last Name - Type your first and last names in these boxes as you would have them appear on the printed or faxed purchase orders or requests for quotation.

Middle Name, Title, Address, City, State/Region, Zip/Postal Code, Email, Home Phone, Work Phone - Information entered in these fields will **not** appear on the printed and faxed purchase order or request for quotation. They are for reference only.

Edit Projects

This form allows you to manage all projects in the database. By associating your purchase orders with projects you can determine at a later date all items purchased for that project.

To open this form, select **Edit | Database...** from the menu or click the Edit Database toolbar button or press Ctrl+D then select the **Project** tab. On the left side of the form is a tree control that lists all companies and the projects that are associated with them. On the right side of the form are the boxes for viewing/editing information about the projects. At the bottom of the form are buttons to add, update or delete projects from the database.

Add a Project

To add a project to the database, perform the following steps:

- 1) Click on the company for which you will add the project.
- 2) Fill in all the boxes on the right side of the form. See Filling in the Form below.
- 3) Click the **Add** button at the bottom of the form. After you click the **Add** button, the list will be updated and the project will show up under the appropriate company.

Update a Project

To update project information, perform the following steps:

- 1) Select the project from the list on the left side of the form. The boxes on the right side of the form will be filled in with the project information.
- 2) Change the appropriate information in the boxes on the right of the form.
- 3) Click the **Update** button at the bottom of the form.

Delete a Project

To delete a project from the database, perform the following steps:

- 1) Select the project from the list on the left side of the form.
- 2) Click the **Delete** button at the bottom of the form.

- 3) Click the **Yes** button in the confirmation dialog.

Filling in the Project Form

For all of the boxes except the **Company** box, simply click in the box and begin typing. For the **Company** box, simply click on the down arrow next to the box, and then make a selection from the list. You can also choose the company to which a particular project will be associated by selecting it from the list on the left. When you are finished entering information for one field, press the **Tab** or **Enter** key to move on to the next field. Below is a description of each field:

Company - The company to which a project will be associated.

Project Name - Descriptive name for the project. This field can be up to 50 alphanumeric characters long.

Charge Number - Designation used by your accounting system/department for a particular project.

Edit Other

Some information stored in the database such as category, department, F.O.B., ship via, and terms are simple strings that are added directly into combo boxes on the various forms where they appear. Many times if a combo box on a form does not contain the string you need, simply type it directly into the box. In most cases the string will be added to the database so that the next time you select the combo box down arrow, the string will appear in the drop down list. The Edit Other form allows you to manage these types of strings.

To open this form, select **Edit | Database...** from the menu or click the Edit Database toolbar button or press Ctrl+D then select the **Other** tab. At the top of the form is a combo box labeled **List**. This combo box contains a list of the types of strings that you can manage from this form. First select the list from which you wish to add or delete strings by choosing it in the **List** combo box. The strings currently defined for that list will appear in the list below the combo box. Having selected the list, you can now either add strings to it or delete strings from it.

Add a String

To add a string to a particular list in the database, perform the following steps:

- 1) Select the list of interest from the **List** combo box.
- 2) Type the new string into the edit box to the right of the list.
- 3) Click the **Add** button to the right of the list. After you click the **Add** button, the list will be updated and the new string will appear in the list.

Delete a String

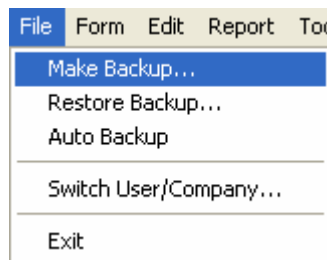
To delete a string from a particular list in the database, perform the following steps:

- 1) Select the list of interest from the **List** combo box.
- 2) Select the string that you wish to delete from the list below the combo box. The string you are about to delete will appear in the edit box to the right of the list.
- 3) Click the **Delete** button to the right of the list. After you click the **Delete** button, the list will be updated and the string will no longer appear.

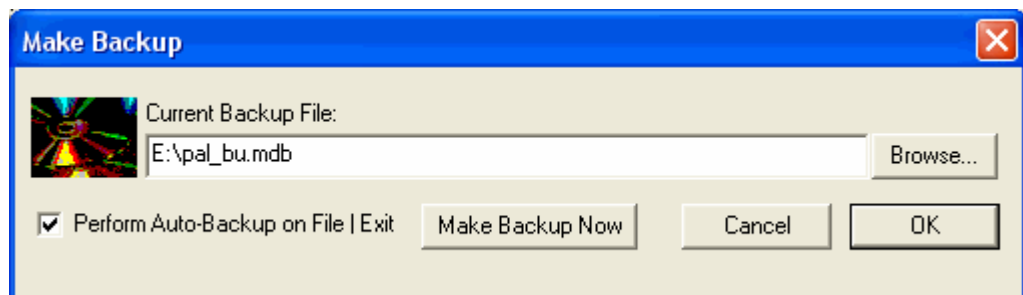
Backing Up the Database

It's a good idea to periodically make a backup copy of your database. Doing so will insure that you don't completely lose your vendors, parts, and other data if you have to re-install PAL after a hard disk crash or some other catastrophe. We recommend that you perform your backup to either a network drive or removable media such as CDs, USB hard disk sticks, Zip disks, etc. You can also make a backup on your local hard drive if you're concerned about making changes that you may have to undo later. You can configure PAL to automatically backup your database whenever you exit the program or you can perform a manual backup anytime.

To make a backup copy of your database, select **File | Make Backup...** from the menu.



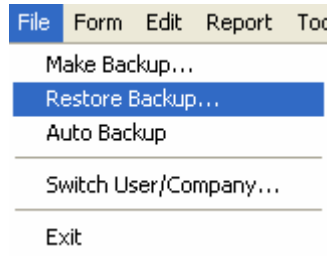
The following dialog will be displayed:



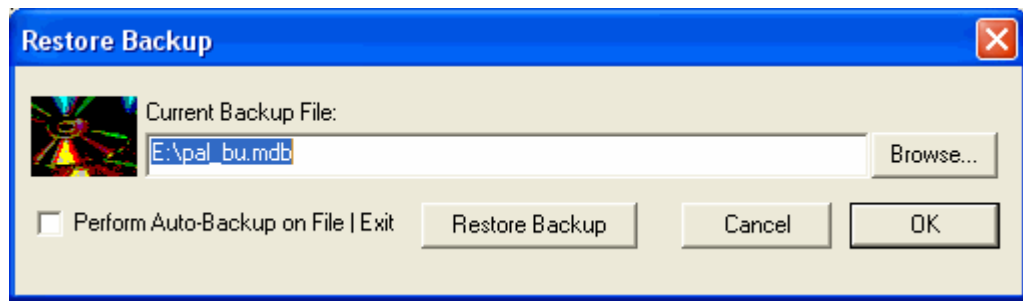
First specify the path for the backup file by typing it in the edit box labeled "Current Backup File:" or by browsing for it by selecting the **Browse** button. When using "Browse", simply browse into the folder that will contain the backup, then type the filename if you don't like the default. Now click the **Make Backup Now** button if you wish to immediately make a backup. If you want PAL to automatically create a backup for you every time you exit the program, simply check the **Perform Auto-Backup on File | Exit** box then click the **OK** button.

Restoring the Database from a Backup

Your database can only be restored to the state it was in when you performed your last backup (See Backing Up the Database). To restore a backup copy of your database, select **File | Restore Backup...** from the menu.



The following dialog will be displayed:



The pathname to where the last backup was made will appear in the "Current Backup File:" edit box. If this is not the file that you wish to restore your database from, either type the new path in the edit box or browse for the file using the **Browse** button. After you are satisfied with the backup file path that is displayed in the "Current Backup File:" edit box, then click the **Restore Backup** button. You will be prompted to confirm that you really want to restore the database from the selected file since this is an operation that cannot be reversed. If you answer, "Yes" to the confirmation dialog, the current database will be closed, the backup database will be copied over it and you will be prompted to log in again.

If you would like PAL to automatically create a backup for you every time you exit the program, simply check the **Perform Auto-Backup on File | Exit** box before clicking the **Restore Backup** or **OK** buttons.

Section

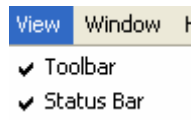
8

The Toolbar and Status Bar

Purchase Agent Lite provides toolbar buttons for the most frequently used tasks. The Status Bar provides a brief description of a menu item when you move the mouse over it as well as the state of certain keyboard keys.

The Toolbar

When the toolbar is displayed it will appear just below the menu bar. To display/hide the toolbar, select **View | Toolbar** from the menu. Check the menu item to display the toolbar, uncheck the menu item to hide the toolbar.



Simply click once on the desired button to invoke its functions.



Create/Open Form - This button displays the Create/Open Form dialog for creating/opening Purchase Orders and Request for Quotes



Print Preview - This button displays a preview of the printed/sent version of a Purchase Order or a Request for Quotation.



Print/Send - This button displays the Print/Send dialog for Purchase Orders or Request for Quotations.



Delete Vendor Sheet - This button deletes the current vendor sheet from the active Purchase Order.



Item Catalog - This button displays the Item Catalog used to quickly add items to a Purchase Order.



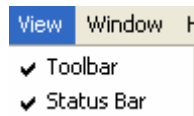
Edit Database - This button displays a tabbed dialog for editing Products, Vendors, Companies, Ship to Addresses, Credit Cards, Users, Projects, Categories, Special Instructions, etc.



Help Topics - This button displays online help.

The Status Bar

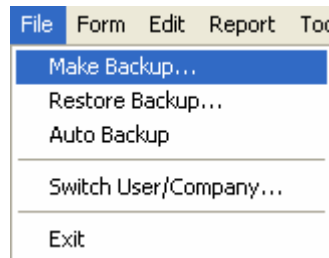
When the status bar is displayed it will appear at the bottom of the Purchase Agent Lite window. To display/hide the status bar, select **View | Status Bar** from the menu. Check the menu item to display the status bar, uncheck the menu item to hide the status bar.



Menus

All Purchase Agent Lite functions can be accessed from the menus.

File Menu



Make Backup... - Use this menu function to back up your database. See “Backing Up the Database” in Section 7 for more information.

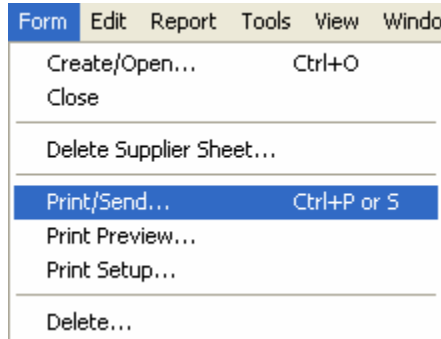
Restore Backup... - Use this menu function to restore a previously backed up database. See “Restoring the Database from a Backup” in Section 7 for more information.

Auto Backup – Select this menu item if you wish to have PAL automatically back up your database each time you exit the program. A checkmark next to this menu item indicates that PAL will back up your database to a destination prescribed by the Make Backup... menu function.

Switch User/Company... – When you select this menu item, all purchase order, request for quotation and report windows are closed and the login window is presented. This function essentially logs you out but leaves the program running.

Exit – Use this menu function to end your Purchase Agent Lite session. You can also use the Close command on the application Control menu or the “X” symbol on the application frame window.

Form Menu



Create/Open... - Use this menu function to create new or open existing purchase orders or requests for quotations. For more information click one of the following: Purchase Orders or Requests for Quotation.

Close - Use this menu function to close a purchase order or request for quotation window.

Delete Vendor Sheet... - Use this menu function to delete a vendor sheet from a purchase order. The active vendor sheet (currently selected tab on a PO) will be the sheet that is deleted once you answer “Yes” to the confirmation dialog.

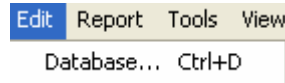
Print/Send - Use this menu function to open up a dialog from which you can print or fax your purchase order or request for quotation. For more information click one of the following: Purchase Orders or Requests for Quotation.

Print Preview - Use this menu function to view your purchase order or request for quotation before it is sent or printed. The PO or RFQ will appear in the preview window almost exactly as it will appear on a printer or fax machine. For more information click one of the following: Purchase Orders or Requests for Quotation.

Print Setup... - This menu function presents a standard Windows printer properties dialog allowing you to change such things as paper layout, etc.

Delete... - Use this menu function to delete purchase orders or requests for quotation from the database. For more information click one of the following: Purchase Orders or Requests for Quotation.

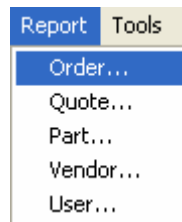
Edit Menu



Database... - Use this menu function to edit products, vendors, companies, ship to addresses, credit cards, users, projects and other information stored in the database. For more information on editing the database see Section 7.

Report Menu

See Section 6 for more information on how to create reports.



Order... - Use this menu function to create purchase order reports.

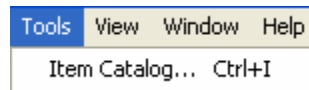
Quote... - Use this menu function to create request for quotation reports.

Part... - Use this menu function to create listings of the parts contained in your database

Vendor... - Use this menu function to create listings of the vendors contained in your database.

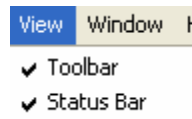
User... - Use this menu function to create listings of the users contained in your database.

Tools Menu



Item Catalog... - Use this menu function to open the Item Catalog. The Item Catalog provides a convenient way for you to add items to a purchase order. For more information see “Using the Item Catalog” topic in Section 4.

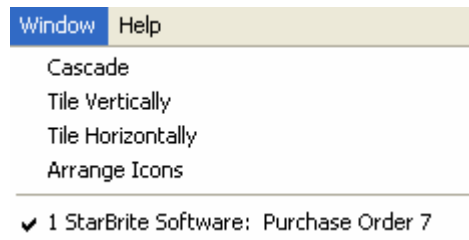
View Menu



Toolbar - Use this menu function to hide or display the toolbar below the menu. A checkmark next to this menu item indicates that the toolbar is being displayed.

Status Bar - Use this menu function to hide or display the status bar at the bottom of the application window. A checkmark next to this menu item indicates that the toolbar is being displayed.

Window Menu



PAL was designed to allow you to have multiple purchase orders and/or requests for quotation open at the same time. Selections in this menu help you to automatically arrange them.

Cascade - Use this menu function to arrange your purchase order or request for quotation windows in a cascading fashion.

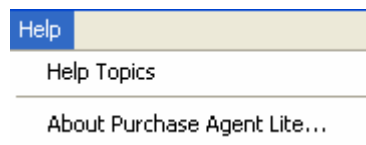
Tile Vertically - Use this menu function to place your purchase order or request for quotation windows side-by-side vertically.

Tile Horizontally - Use this menu function to arrange your purchase order or request for quotation windows in a stacked pattern

Arrange Icons - When you minimize a purchase order or request for quotation window an icon is displayed at the bottom of PAL's frame window. Using the mouse you can move these icons around. Use this menu function to automatically line them all up again.

Window titles - The titles of all the currently open purchase orders or requests for quotation will appear under the Arrange Icons menu selection. A checkmark will appear next to the active window. To activate any of the other windows, simply click on its title.

Help Menu



Help Topics – Select this menu option to display Purchase Agent Lite's help system.

About Purchase Agent Lite - Use this menu function to display the current version of PAL.

Technical Support

We will help you if you can't find the answers you need in this manual or the program help.

For technical support, visit our website at www.towibasoftware.com. If the answer you need is not in the Frequently Asked Questions (FAQ) section, become a registered user and we will respond to you via email.

Glossary

check box – a dialog or form control that has a small square box to the left of some text that describes a program option. When you click the small, square box a checkmark will appear in it indicating that the option is selected. Clicking a checkbox that already has a checkmark will cause the checkmark to be removed, disabling the associated option.

combo box – a dialog or form control that has a box with a down arrow on the right side. When the down arrow is clicked, a list of strings appears below the edit box from which the user can make a selection.

edit box – a dialog or form control that has a box for typing in information. To enter information in this type of control simply left click in the box or tab to it then begin typing.

FOB – This term is an acronym for “Free On Board”. It relates to where a vendor’s responsibility ends when shipping your products. If “Origin” is used, then the vendor’s responsibility ends when the product is placed safely on a ship, truck or other means of shipment. If “Destination” is used, then the vendor is responsible for the product until it arrives at your business.

list box – a dialog or form control that displays a list of strings. If the list of strings is too large for them all to be displayed, a vertical scroll bar will appear on the right side of the list.

radio button – a dialog or form control that has a small circle to the left of some text that describes a program option. Radio buttons appear in groups and allow you to pick one of several mutually exclusive options. When you click one radio button in a group, its circle gets filled in and the rest become empty. The option with the filled in circle is the one that is currently selected.

tree control – a dialog or form control that displays information in a hierarchical fashion. A small plus sign next to an item indicates that the item has sub-items. To display the sub-items simply click on the plus sign. The plus sign turns to a minus sign and the sub-items are displayed below the item.

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